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PROCEDURES FOR CONDUCTING THE DD/I REPORTS MANAGEMENT SURVEY

1. GENERAL

The reports survey is an essential step in establishing the DD/I Reports Management Program. It provides the foundation, that is: (1) A complete description and case history of each reporting requirement, and (2) an appraisal of these requirements to point up reporting deficiencies and ways to correct them. In addition, the survey will provide experience on which to base policies and procedures for continuing the program. The importance of this survey thus dictates that persons selected to participate should have a broad knowledge of the reporting requirements of their component, and be qualified to appraise them objectively for possible improvements.

2. DEFINITIONS

- a. Report - An account or statement of information in written narrative, tabular, punch card, or graphic form, transmitted from one organizational element to another in response to an expressed or assumed need for information.
- b. Administrative or Management Report - A report that provides for administrative or management control over an activity or operation, as distinguished from an operational or intelligence report.
- c. Recurring Report - Either a periodic report which conveys essentially the same type of information at prescribed intervals (daily, weekly, monthly, etc.) or a situation report which is prepared on each occurrence of an event of certain prescribed characteristics.
- d. Required Report (Incoming Report) - A report which a component requires from one or more other elements. The report is an incoming report to the office which requires it.
- e. Prepared Report (Outgoing Report) - A report which a component prepares at the request of another element. The report is an outgoing report from the office which prepares it.

3. THE INVENTORY

- a. The following action shall be taken on each existing requirement for either a required or prepared report:
 - (1) Complete an original and one copy of Form No. 521, Report Survey (Attachment A).

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ENCLOSURE 2

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- (2) To the original of each survey form, attach one copy of each directive having a bearing on the report, a specimen copy of the report, and any other descriptive material. It will not be necessary to furnish copies of directives issued as Agency or ID/I regulatory material.

4. THE APPRAISAL

- a. Personnel shall appraise each reporting requirement simultaneously with taking the inventory. The need for required reports will be fully justified. Prepared reports shall be examined with a view to improving preparation procedures, and recommending to requiring offices ways to reduce or simplify reporting.
- b. Form No. 521, Report Survey, contains questions which establish criteria for appraising reports. Additional and more detailed guidance may be found in Attachment B, "Analyzing Requirements for Administrative and Management Reports."

5. SUBMISSION OF SURVEY MATERIAL

Completed Report Survey forms, together with supporting material and recommendations, shall be forwarded through administrative channels according to the following schedule:

- a. Survey material on all the reports inventoried by an Office shall be submitted to the respective Reports Management Officer by _____ 1955.
- b. Survey material on those reports that are either required from or prepared for components outside an Office shall be forwarded to the Assistant to ID/I (Administration) by _____ 1955.

6. REVIEW OF SURVEY MATERIAL

- a. The reporting requirements surveyed shall be reviewed for the possible application or further development of recommendations. Intra Office reports shall be reviewed by Reports Management Officers who will recommend appropriate action to Assistant Directors. All other reports shall be reviewed by the ID/I Reports Review Panel, composed of the Assistant to ID/I (Administration) as Chairman, and Reports Management Officers representing their respective Offices.

Attachments

- A. Form No. 521, Report Survey
B. "Analyzing Requirements for Administrative or Management Reports"
C. Form No. 142, Request for Approval of a New or Revised Reporting Requirement

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